



**David M. Blanchett, CFA, CFP®**  
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David M. Blanchett, CFA, CFP® is the Head of Retirement Research for Morningstar's Investment Management division in Chicago. In this role, he develops new methodologies related to strategic and dynamic asset allocation, simulations based on wealth forecasting, and other investment and financial planning areas for the investment consulting group. He also serves as the Chairman of the Advice Methodologies investment subcommittee.

At Morningstar, Blanchett works closely with the business leaders of the Investment Management division to provide research support for the group's consulting activities. He conducts client-specific research primarily in the areas of financial planning, tax planning, annuities, and retirement plans. Prior to joining Morningstar, Blanchett was the director of consulting and investment research for the retirement plan consulting group at Unified Trust Company in Lexington, KY.

Blanchett has authored more than 40 articles that have been published in ASPPA Journal, Investment News, the Journal of Financial Planning, the Journal of Index Investing, the Journal of Indexes, , the Journal of Indexes Europe, the Journal of Investing, the Journal of Performance Measurement, the Journal of Pension Benefits, and the Retirement Management Journal. He won the Journal of Financial Planning 2007 Call for Papers for research paper on optimal glidepath allocations for retirees and the Retirement Income Industry Association 2012 Thought Leadership Award for research on portfolio withdrawal strategies.

Blanchett has been quoted by AdvisorOne, the Chicago Tribune, Financial Planning magazine, Ignites, InvestmentNews, Marketwatch, Money magazine, Pensions & Investments, PLANSPONSOR, Planadviser, SmartMoney, and the Wall Street Journal. He has presented his research and participated in panels at a number of regional and national conferences for groups such as the Academy of Financial Services, ASPPA, fi360, the Financial Planning Association, Morningstar, Pensions & Investments, and the Retirement Income Industry Association,

Blanchett currently holds the following professional designations or certifications, including: Certified Financial Planner™ (CFP®), Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Accredited Investment Fiduciary Analyst™ (AIFA®), Qualified Pension Administrator (QPA), Qualified 401(k) Administrator (QKA), and he is a Chartered Financial Analyst (CFA) charterholder. He holds a bachelor's degree in finance and economics magna cum laude from the University of Kentucky, a master's degree in financial services from the American College in Bryn Mawr, PA, and a master's degree in business administration with a concentration in analytic finance from the University of Chicago Booth School of Business. He is taking classes toward a doctorate in personal financial planning at Texas Tech University.



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